Chapter

4

Procedures Module

Procedures are templates listing the specific tasks, labour and materials for a specific job that is reoccurring. This Chapter describes how to use the Web Work, Procedures module.

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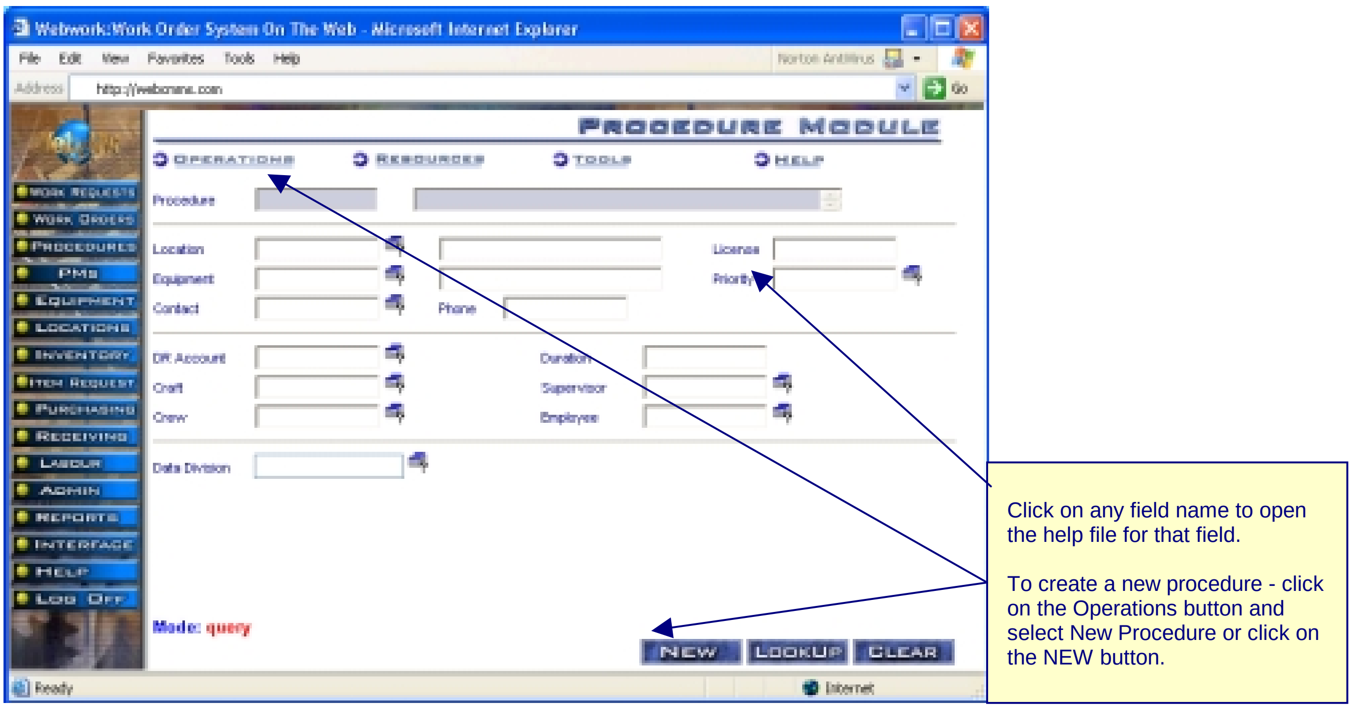
1.1 Overview of the Procedure Module

The Procedures module is used to setup templates for reoccurring work, which can be used on work orders and preventive maintenance work orders. Once set up, procedures can be used on work orders to eliminate duplication of data entry.

Click on the PROCEDURES button PROCEDURES on the left hand side of the screen to access the Procedures module.

When you enter the Procedures module, you will be in Query mode as shown in the screen below:



The OPERATIONS OPERATIONS, RESOURCES RESOURCES, TOOLS TOOLS and HELP HELP drop down menus contain the various features available in the Procedures module.

Web Work includes "help files" for all field names. To access these help files, click on the field name. A popup window will open displaying help for the field selected.

2.1 Using Procedures

Set up procedures for all reoccurring maintenance tasks. By doing so you can save valuable data entry time – you will no longer have to retype the same procedure each time you use it on a work order. Procedures also ensure that employees/contractors use the same methodology when performing a maintenance task: repairs are done in the same order, using the same materials. Procedures are also valuable to determine amount of time required, when scheduling a work order.

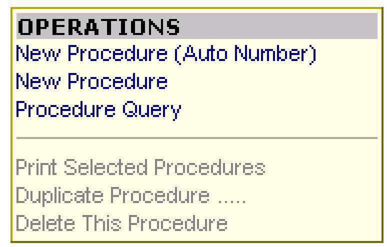
2.1.1.1. Creating New Procedures

To create a new procedure:

- Click on the PROCEDURES button button PROCEDURES on the left hand side of the screen to access the Procedures module.

  The screen will open in Query mode.

- Click on the OPERATIONS menu at the top of the Procedures Screen to display the drop down menu.

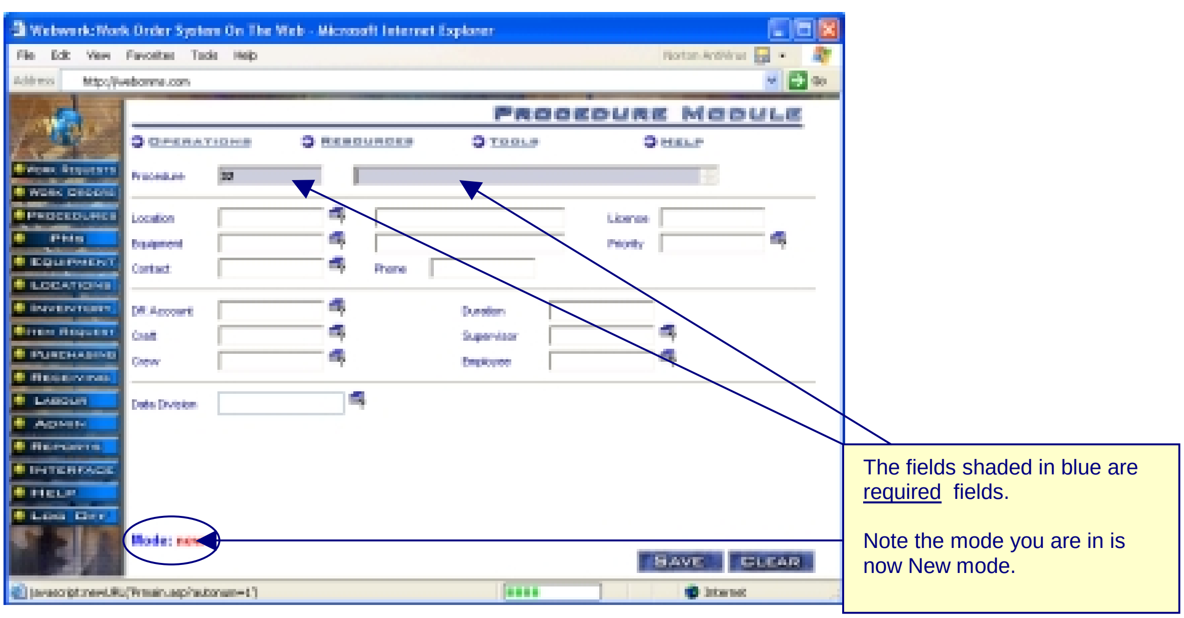


- Select New Procedure or New Procedure (Auto Number) for the drop down menu.

  Auto Numbering is setup in the Admin module. See the Admin chapter of this manual for more information on setting up Auto Numbering.

When you are in query mode, you can also click on the NEW button at the bottom right hand side of the page to open a new procedure.

The following screen will open:



- Enter information into the fields displayed on the screen. Note: Procedure ID and Description are the only required fields.

- Click on the SAVE button at the bottom right hand side of the screen to save the new Procedure record.

- You will then be in edit mode: you can edit and resave the procedure, add tasks, labour and materials to the procedure, print the procedure, or continue working in the module of your choice by clicking on the module on the right hand side of the screen.

3.1 Procedure Estimates

Procedure estimates can be added to a procedure when it is created or at a later date. Procedure estimates will help employees/contractors determine what is needed. You can add estimates to a procedure when creating a procedure or at a later date.

3.1.1. To add estimates to a procedure at the same time the procedure is created:

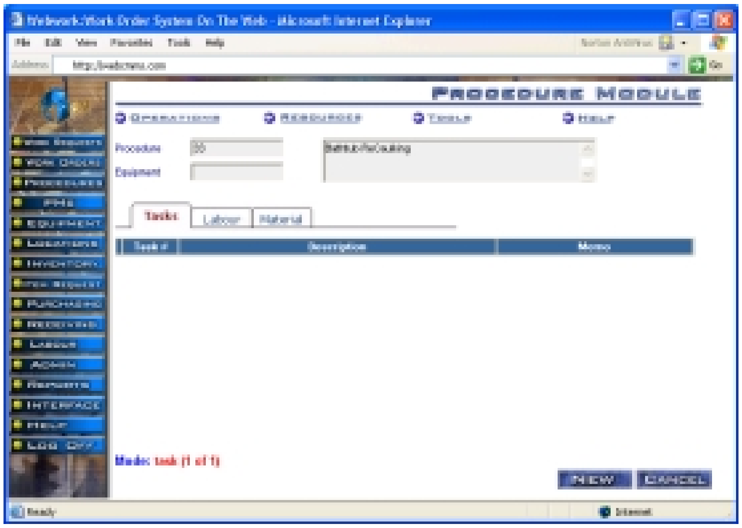
- Click on the SAVE button at the bottom right hand side of the screen to save the new Procedure record.

- Click on the RESOURCES menu to display the drop down menu.

- Select Estimates from the drop down menu.

If you have your system defaults set to open New on Saving, you will have to perform a Procedure Query to locate this procedure and open it before clicking on the Resources button and adding estimates to this procedure.

- The Add Estimates screen as pictured to the right will open:



3.1.2. To add estimates to a procedure after the procedure has already been created:

- Perform a Procedure query to locate the desired procedure. See the procedure queries section of this chapter for more information on performing queries.

- Retrieve the procedure.

- Click on the 

menu to display the drop down menu.

- Select Estimates from the drop down menu.

- The procedure will open in estimates mode.

3.1.3. Adding Estimates - Tasks

By adding tasks to a procedure, the employee assigned to complete a work order where this procedure is used, will be provided with a checklist of tasks for completing the work.

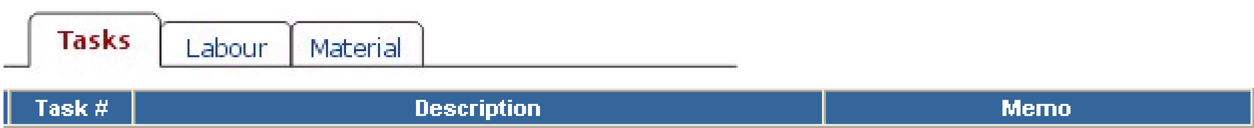
To add tasks to a procedure:

- Open the applicable procedure in Edit mode.

- Click on the 

menu to display the drop down menu.

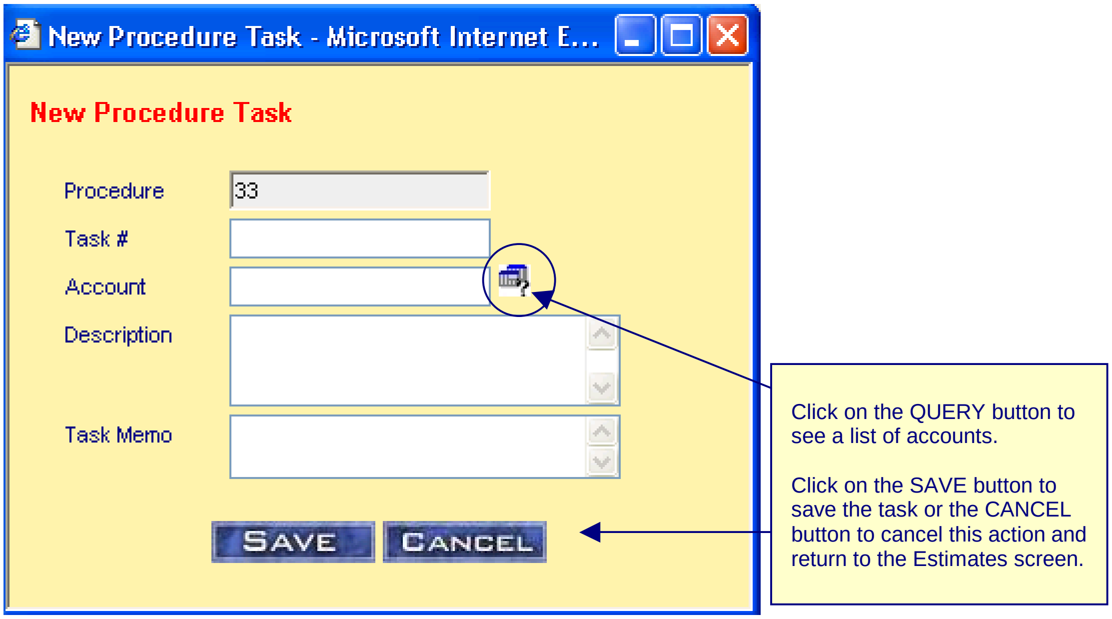
- Select Estimates from the drop down menu.



- In the Add Estimates screen there are three tabs: Tasks, Labour and Material.

- Click on the Tasks folder to open it. Note: when you enter the Estimates screen, you will be in Task mode.

- Click on the NEW button  to open the Add Tasks screen as pictured below:



- The Procedure ID is entered automatically by the Web Work system and cannot be edited.

- Enter a task number. IE: 1, 2, 3 or A. B. C. etc.

- Enter an Account if applicable or click on the QUERY button  to select an account from the Web Work database.

Leave the account field blank if this procedure is going to be split between multiple accounts. See Procedures – Accounts for more information.

- Enter a Description of the task. IE: Turn off the power.

- Enter a Task Memo. IE: Make sure no one is using the machine before you shut down the power.

- Click on the SAVE button  at the bottom right hand side of the screen to save the task.

  This will return you to the Estimates screen in Task mode where you can continue to add Tasks, add Labour or Materials or return to the main screen of the procedure.

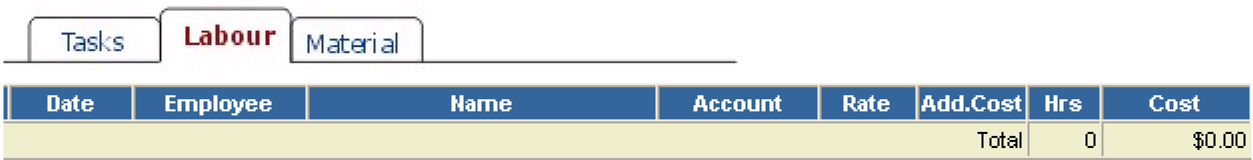
To return to the main screen of a procedure after saving an Estimate, click on the CANCEL button at the bottom right hand side of the page or click on the RESOURCES menu and select Details from the drop down menu.

3.1.4. Adding Estimates - Labour

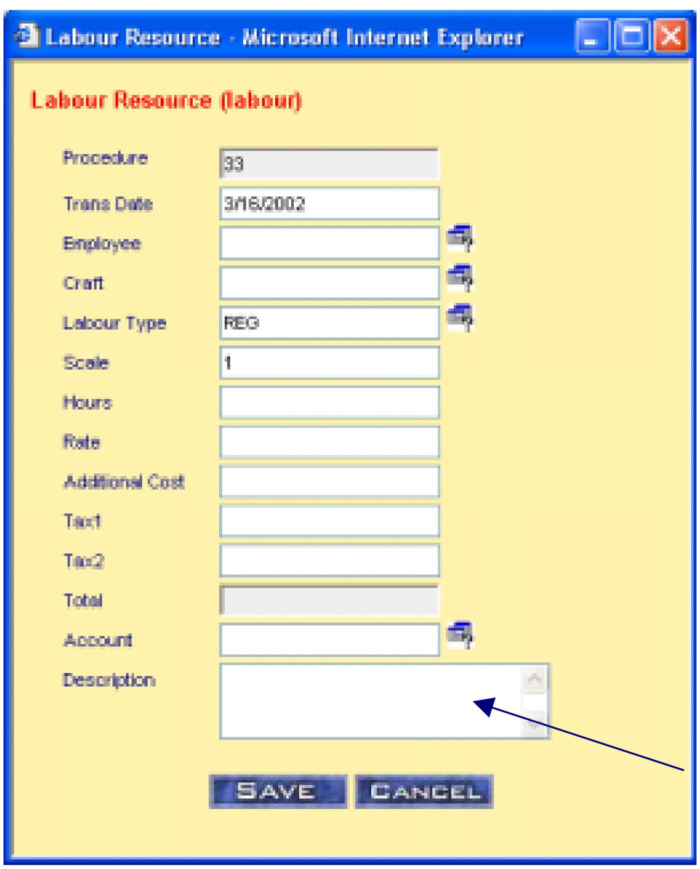
Add labour to a procedure to indicate what type of employee or contractor is required to perform the work.

To add labour to a procedure:

- Open the applicable procedure in Edit mode.
- Click on the RESOURCES menu to display the drop down menu.
- Select Estimates from the drop down menu.



- In the Add Estimates screen there are three tabs: Tasks, Labour and Material.
- Click on the Labour folder to open it. Note: when you enter the Estimates screen, you will be in Task mode.
- Click on the NEW button NEW to open the Add Labour screen as pictured below:



The procedure, trans date, Labour Type and Scale fields are filled in automatically .

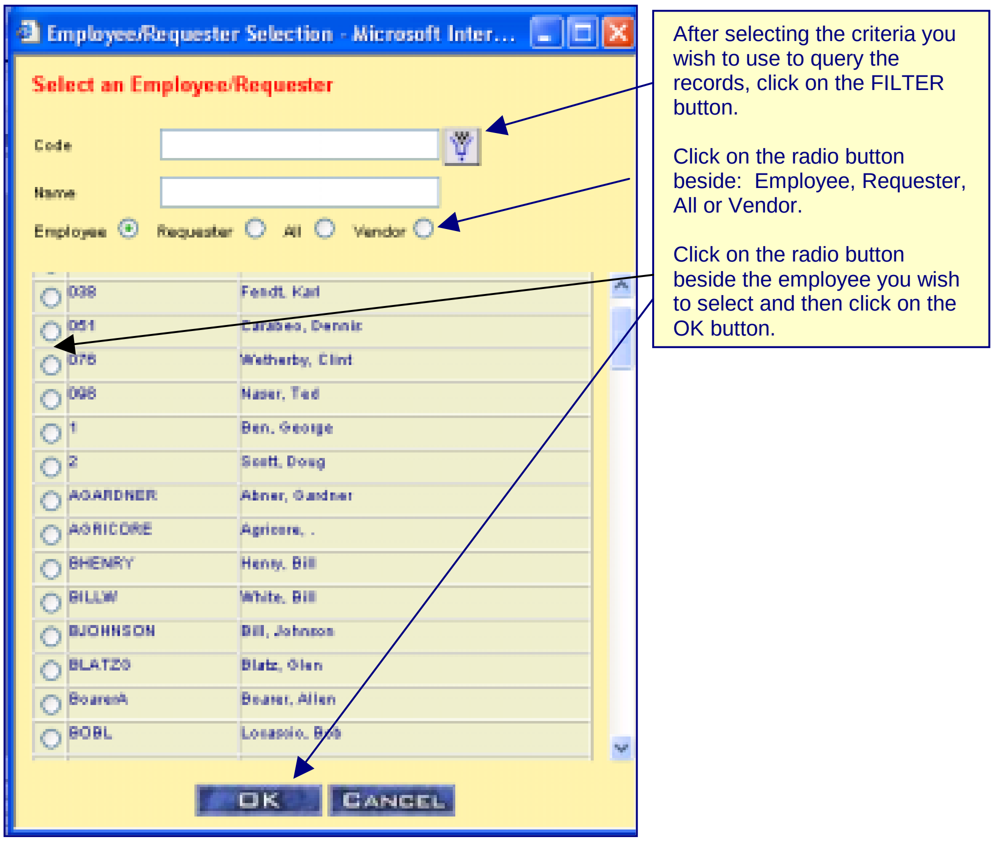
The description field will display the complete name of the Employee ID you selected.

- The Procedure ID and Trans Date fields are filled in automatically. The Procedure ID field cannot be edited, however the Trans Date field can. To edit this field, delete the current date and add the date of your choice.

- Enter an employee or click on the QUERY button to select an employee from the Web Work database. If a rate for the employee you choose has been entered in the Labour module the rate field will be updated with this amount.

  When you click on the QUERY button beside the Employee field, a screen such as the one shown below will open.

  You can filter the information by: the Code or Name of your choice, or by Employee, Requester, All or Vendor.



- Enter a craft or click on the QUERY button to select a craft from the Web Work database.

- Enter a Labour Type or click on the QUERY button to select a labour type from the Web Work database.

- The Scale automatically defaults to 1. To change this, delete the current scale and add the scale of your choice.

- Enter the estimated number of hours into the Hours field. When you enter the number of hours, the taxes and total will be calculated by the Web Work system.

- The Rate field will be filled in with the rate setup for the employee in the Labour module. To change this rate, delete the rate shown and enter the rate of your choice.

- Enter any additional cost. If an additional cost is added, the taxes and total will be updated accordingly.

- Enter Tax 1 and 2 if applicable. If taxes are entered the total will automatically be recalculated.

- Enter an account if applicable.

- The Details field displays the complete name of the Employee you choose.

- Click on the SAVE button at the bottom right hand side of the screen to save the labour estimate.

  This will return you to the Estimates screen in Labour mode where you can continue to add Labour, add Tasks or Materials or return to the main screen of the procedure.

When you save a task, labour or material estimate, the estimate will be displayed in the table on the related estimate screen.

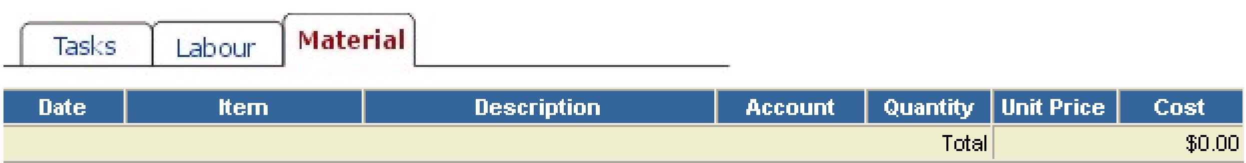
3.1.5. Adding Estimates - Materials

Add materials to a procedure to indicate the items required to do a job.

To add materials to a procedure:

- Open the applicable procedure in Edit mode.

- Click on the RESOURCES menu to display the drop down menu.



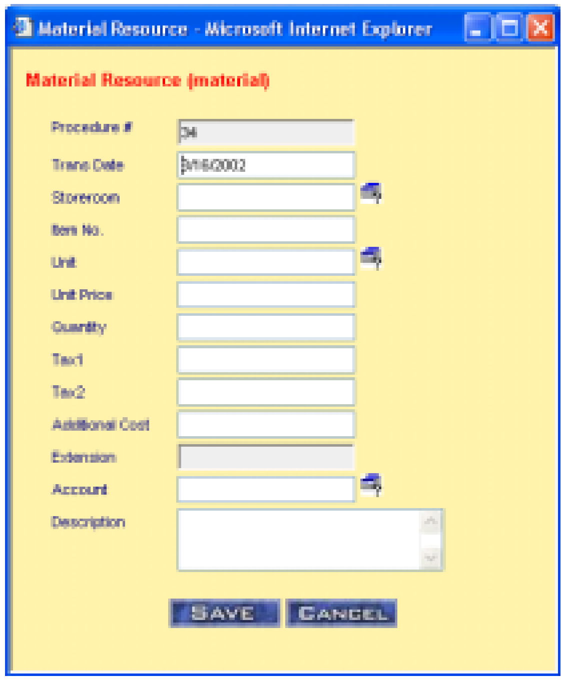
Date	Item	Description	Account	Quantity	Unit Price	Cost
				Total		$0.00

- Select Estimates from the drop down menu.

  In the Add Estimates screen there are three tabs: Tasks, Labour and Material.

- Click on the Material folder to open it. Note: when you enter the Estimates screen, you will be in Task mode.

- Click on the NEW button to open the Add Material screen as pictured below:



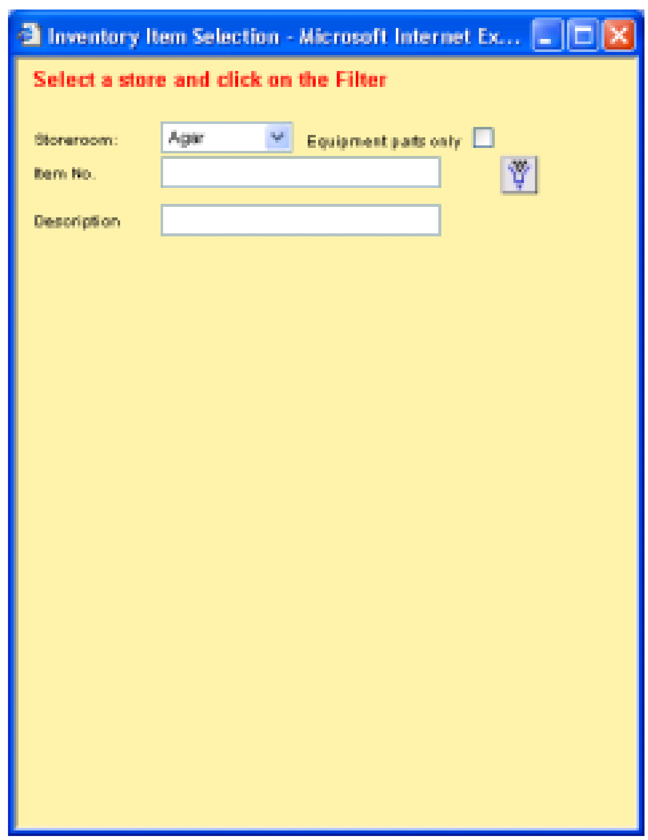
- The Procedure ID and Trans Date fields are filled in automatically. The Procedure ID field cannot be edited, however the Trans Date field can. To edit this field, delete the current date and add the date of your choice.

- Enter a storeroom or click on the QUERY button to select a storeroom from the Web Work database. A screen similar to the one shown to the right will open.

- Click on the down arrow to select a Storeroom from those set up in the Web Work system and then click on the FILTER button to display a list of inventory in this storeroom.

- Click the radio button beside the inventory item you wish to select..

- This will populate the Storeroom, Item, Unit and Price fields on the Material Resource screen.



- Enter the quantity. The tax and extension fields will be calculated automatically.
- Enter any additional cost. When an additional cost is added, the tax and extension field will automatically be recalculated.
- Enter an account if applicable or click on the QUERY button to select an account from the Web Work database.
- The description field will automatically populate with the description of the Inventory item selected.
- Click on the SAVE button SAVE at the bottom right hand side of the screen to save the material estimate.
- This will return you to the Estimates screen in Material mode where you can continue to add Materials, add Tasks or Labour or return to the main screen of the procedure.

To enter a non-inventory item, leave the Storeroom field blank and enter information into the other fields as required.

3.1.6. Editing Procedure Estimates

To edit procedure estimates:

- Click on the PROCEDURES button PROCEDURES on the left hand side of the screen to access the Procedures module.
- Perform a procedures query to locate and retrieve the procedure record you wish to edit. See procedure queries for more information on procedure queries.
- Click on the RESOURCES menu to display the drop down menu.
- Select Estimates from the drop down menu.
- Click on the task, labour or materials tab, depending on which one you want to edit.
- Click on the item from the task, labour or materials table that you wish to edit.
- Enter the new information into the applicable fields.
- Click on the SAVE button SAVE at the bottom right hand side of the screen to save the edited estimate.

4.1 Duplicating Procedures

Web Work contains a duplicating procedures feature, which allows you to duplicate a procedure rather than having to re-enter procedures that are the same or similar in nature.

To duplicate a procedure:

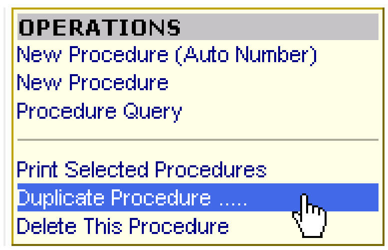
- Click on the PROCEDURES button 

on the left hand side of the screen to access the Procedures module.

- Perform a procedures query to locate and retrieve the procedure record you wish to duplicate. See procedure queries for more information on procedure queries.

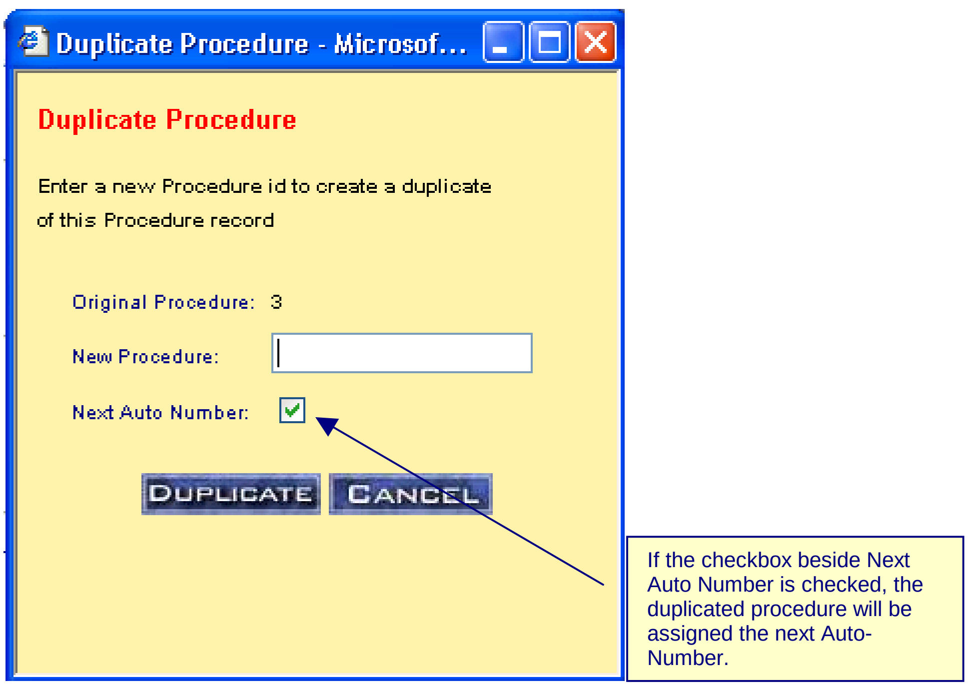
- Click on the 

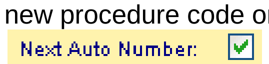
menu at the top of the Procedures Screen to display the drop down menu.



- Select Duplicate this Procedure from the drop down menu.

  The following screen will open:



- Enter a new procedure code or click on the checkbox beside Next Auto-Number 

to have the system assign the next available auto number.

- Click on the DUPLICATE button 

to duplicate the procedure. Estimates associated with the original procedure will also be duplicated.

5.1 Procedure Accounts

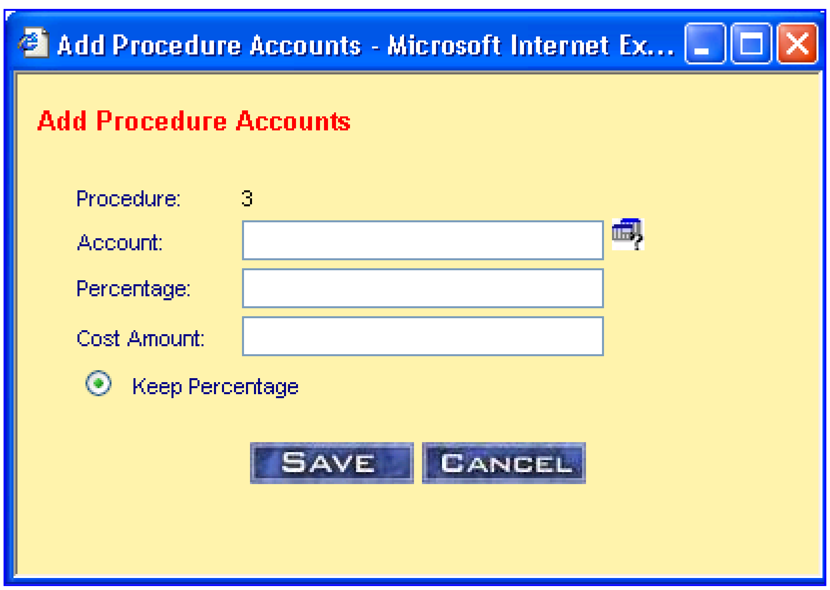
A procedure can be assigned to one account or to a variety of accounts depending on the accounting practices of your organization. If only one account will be used to apply the labour and materials for a procedure, simply enter the applicable account in the Account # field on the main procedure screen.

When assigning procedures to multiple accounts you can set the costing to never exceed either the percentage rate or the cost total you choose.

5.1.1. Applying Procedure Costs to more than one Account

To apply procedure costs to more than one account:

- Click on the PROCEDURES button PROCEDURES on the left hand side of the screen to access the Procedures module.
- Perform a procedures query to locate and retrieve the procedure record you wish to add Accounts to. See procedure queries for more information on procedure queries.
- Click on the RESOURCES menu to display the drop down menu.
- Select Accounts from the drop down menu.
- Click on the NEW button NEW to open the Add Procedure Account window.



- Enter an account into the Account field, or click on the QUERY button to select an account from the list of accounts in the Web Work database.
- Enter the percentage of the procedure that is to be charged to this account. Do not enter a percent sign, only the numerical value of the percent.

- The cost amount will be calculated automatically by the Web Work system.
- Click the RADIO button beside Keep Percentage.
- Click on the SAVE button to save this account information.

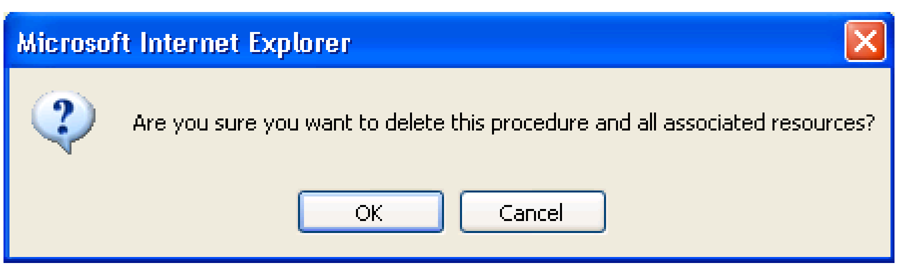
  You can then return to the main procedure screen by clicking on the RESOURCES menu and selecting Details from the drop down menu or by clicking on the CANCEL button on the bottom right hand side of the screen.

6.1 Deleting Procedures

Caution should always be used when deleting records from the Web Work database. However, there may be times when this is necessary. An example would be when a procedure is entered in error. Since you cannot edit a procedure code, you could delete the procedure and then re-enter it using the correct information.

To delete a procedure:

- Click on the PROCEDURES button on the left hand side of the screen to access the Procedures module.
- Perform a procedures query to locate and retrieve the procedure record you wish to delete. See procedure queries for more information on procedure queries.
- Click on the OPERATIONS menu at the top of the Procedures Screen to display the drop down menu.
- Select Delete Procedure from the drop down menu.



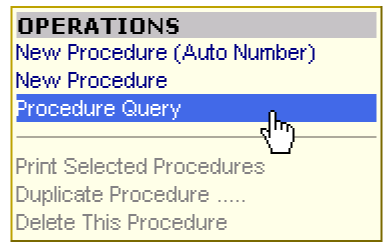
- A message box confirming you want to delete the procedure and associated resources will be displayed.
- Click on the OK button to delete the procedure or the CANCEL button to cancel this action.

7.1 Performing Procedure Queries

Web Work's query by example feature makes it easy to locate and retrieve records based on the criteria you choose. See Query by Example in the System Overview chapter of this manual for more information on query by example.

7.1.1. To perform a Procedure Query

- Enter the Procedures module PROCEDURES by selecting it from the menu on the left hand side of the Web Work screen.



- When you enter the Procedures module you will be in query mode. If you have been working in a different mode, click on the OPERATIONS menu at the top of the Procedures Screen to display the drop down menu and select Procedure Query from the menu.

- The mode you are in is displayed at the bottom left hand side of the screen. (ie: query mode)

- Enter selection criteria into any of the fields. (see Example 1 below)

- Click on the LOOKUP button LOOKUP to display a list of the records, matching the specified criteria.

- To open any of these Procedure records click the selection box on the right hand side of the applicable Procedure(s) in the table, and then click on the RETRIEVE button RETRIEVE at the bottom of the screen.

- The Procedure will appear on the screen. If you selected multiple Procedures, when you retrieve them an arrow will appear on the bottom left hand side of the screen.

- Click on this arrow Next to move from one procedure to the next.

Comparison operators such as: <, >, null, not null and % - wild card can be used to further define a query. See System Overview – Query By Example for more information.

7.1.2. Procedure Queries - Example 1

Query by Example can be used to retrieve records, which contain similar characteristics. For example you may wish to see a list of all procedures that are associated with a specific piece of equipment. In this example the equipment is the air-handling unit with the code AHU-01.

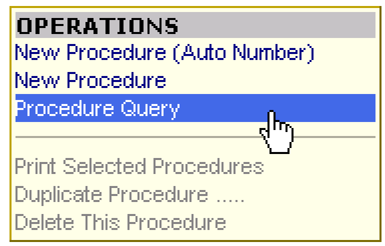
To see a listing of all procedures associated with this air-handling unit:

- Enter the Procedures module 

by selecting it from the menu on the left hand side of the Web Work screen.

- When you enter the Procedures module you will be in query mode. If you have been working in a different mode, click on the 

menu at the top of the Procedures Screen to display the drop down menu.



- Select Procedure Query from the menu.

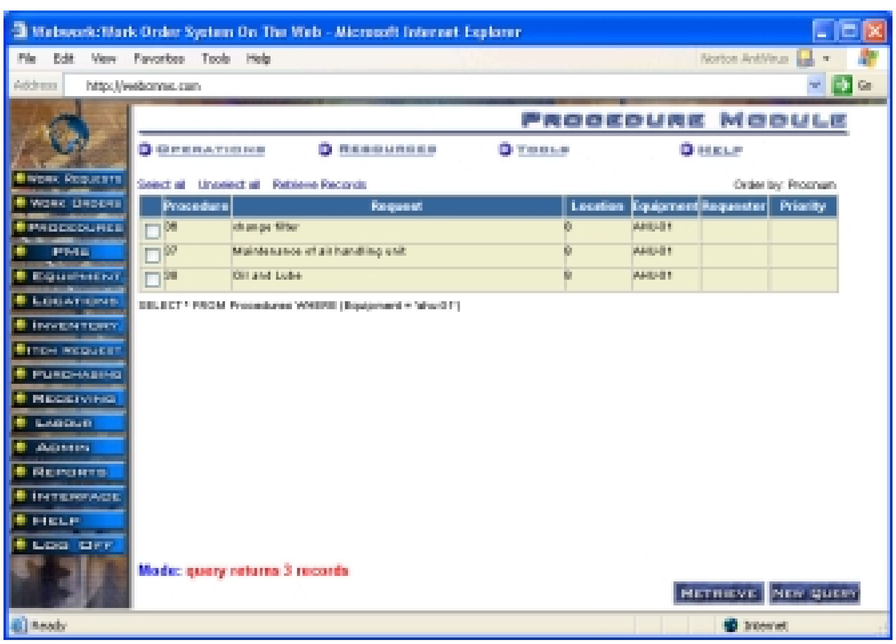
- The mode you are in is displayed at the bottom left hand side of the screen. (ie: query mode)

- Enter AHU-01 into the Equipment field.

- Click on the LOOKUP button 

to display a list of the procedures for this air-handling unit.

  A screen similar to the one shown below will open.



- Click on the checkboxes beside any of the procedures you wish to open or on Select All if you wish to open all these records.

- Click on the RETRIEVE button to open the records you have selected in Edit mode.
- If you selected multiple Procedures, when you retrieve them an arrow will appear on the bottom left hand side of the screen.
- Click on this arrow 

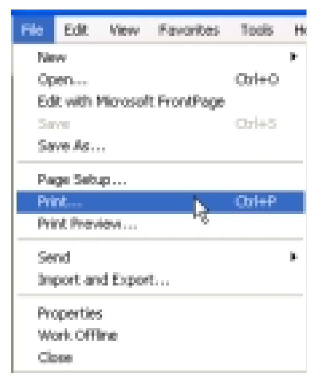
 to move from one procedure to the next.

NOTE: If you wish to open all records with the criteria you have entered, you do not have to click on the LOOKUP button, simply enter the criteria into the applicable field and then press the enter key on your keyboard. All records with the criteria you selected will open in Edit mode.

8.1 Printing Procedures

There are two ways to print Procedures. You can print an individual procedure or multiple procedures that you have selected and retrieved.

8.1.1. <u>Printing Individual Procedure Records</u>



To print only the procedure that is open on the screen:

- Click on the PRINT button 

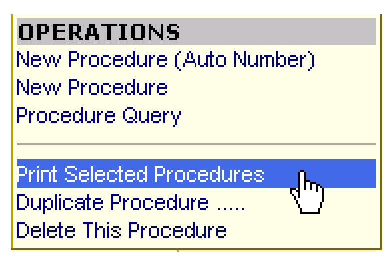
 at the bottom right hand side of the screen.
- The selected record will open in a new browser window.
- Click on File and select Print from the drop down menu to proceed with printing.

8.1.2. <u>Printing Multiple Procedure Records</u>

To print a batch of procedures:

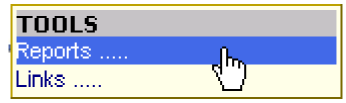
- Perform a procedures query to open the desired procedures. See Procedure Queries for more information on performing procedure queries.
- Click on the 

 menu and choose Print Selected Procedure from the drop down menu.
- The selected records will open in a new browser window.
- Click on File and select Print from the drop down menu to proceed with printing.

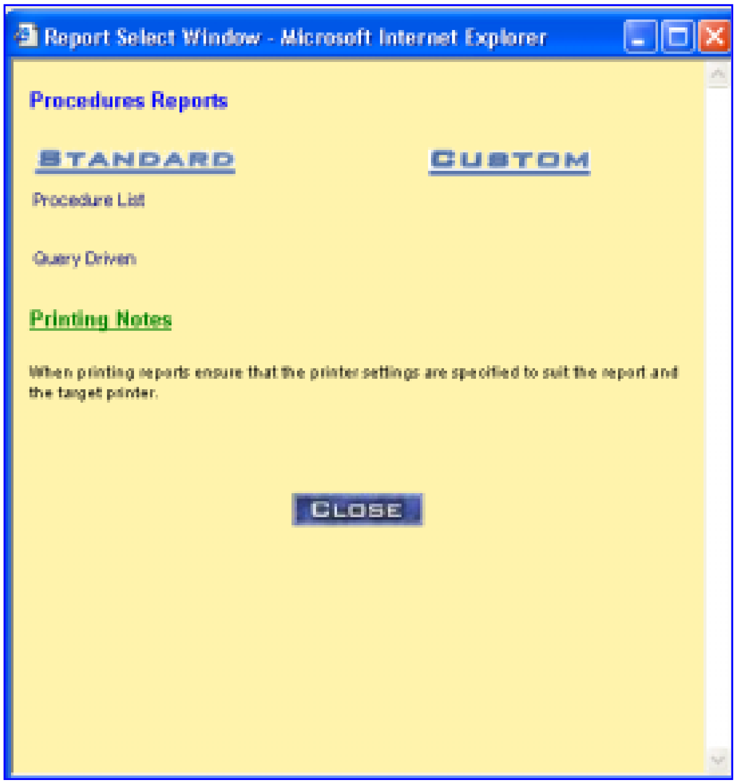


9.1 Procedure – Reports

To access Procedure reports click on the TOOLS menu and select Reports from the drop down menu.



A screen similar to the one shown below will open:



Click on any of the Reports listed under Standard or Custom, to open them.

Only reports applicable to the Procedures module will be displayed. To view all reports, click on the REPORTS module button REPORTS on the left hand side of the Web Work screen. For more information about reports, see the Reports section of this manual.

9.1.1. Creating Procedure Reports

Reports cannot be created in the Procedures module. To create a procedures report click on the REPORTS module button REPORTS to access the report writer and create the report.

9.1.2. <u>Printing Procedure Reports</u>

Procedure reports can be printed from the Procedures module or from the Reports module.

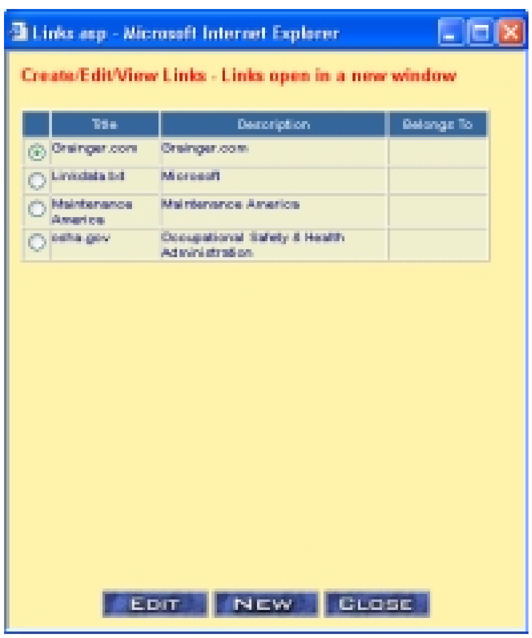
To print a report in the Procedures module:

- Open the Procedures module.
- Click on the TOOLS menu and select reports from the drop down menu.
- Select the report you wish to print by clicking on its title.

  The report will open in Preview mode.
- Click on File and select Print from the drop down menu to print the report.

10.1 Links

When you are in the Procedures module and you select Links from the TOOLS menu, the Web Work Create/Edit Links window will open as shown below. You can view existing links or create new links using this feature.



You can only view links, which have been setup to be accessible from this module or from all modules. Links set up in other modules with the accessibility set as only within that module will not be shown.